

Session 2: Module 6 - In-State Transfers	
FINAL	
Description	Text
1. Introduction	Welcome to Session 2 Module 6
2. Start	<no script>
3. Instate	In-state transfers occur whenever a participant's folder is opened from the statewide list.
	Since your Local database includes only those participants assigned to the clinic you are currently working at, any participants assigned to other clinics in your agency are found in the statewide.
4. Remember	Remember, the statewide database is the largest database. Searching by State WIC ID or Household ID will facilitate the fastest searches.
5. <instate>	Do you remember how to perform a statewide search? Go ahead.
6. <instate1>	We are going to search using the Last Name. Click the Demographics radio button.
7. <instate2>	We are going to search for Greenie Grasshopper who is transferring from Cascade.
	Type grasshopper into the Last Name field and then click search.
8. <instate3>	Only one record matching our criteria was found.
	If we scroll to the right we can see that Greenie is currently assigned to Cascade, which is clinic number 071.
9. <instate4>	<no script>
10. <instate5>	<no script>
11. <instate6>	<no script>
12. <instate7>	Since there is only one matching record, we can be pretty confident this is the Greenie Grasshopper we want to transfer.
	However, whenever we transfer a participant, we should always double-check just to make sure we have the right participant.
	Always verify the birth date is correct and the IDs match (if available)
	Go ahead and click the Show Details button to review any other information that might be pertinent.
13. <instate8>	<no script>

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14. <instate9>	Once you've ensured that you have the correct participant, you initiate the transfer by opening their Participant Folder.
	There are a couple of ways to open the Participant Folder, which you will learn in the next Session.
	For now, there is one more icon you need to learn.
	The Open Participant Folder is the last icon on the right.
	Click the Open Participant Folder icon to open the folder of the participant highlighted in the Participant List.
15. <instate10>	You can only open a participant's folder if they are in your local clinic's database.
	When you try to open the Participant Folder from the Statewide list, you automatically initiate the in-state transfer process.
	Since we want to transfer Greenie, click the Yes button.
16. <instate11>	Since M-SPIRIT is a centralized database, any user-defined alerts transfer immediately and appear before the folder opens.
	Alerts will be discussed in Session 3. For now, simply click the Close button.
17. <instate12>	The Participant Folder will also be discussed in Session 3.
	Notice, though, that the participant's address and phone number transferred with the record.
	Since the participant transferred to your clinic from a different agency, odds are pretty good that they also moved and you will need to remember to update these fields as appropriate.
	Let's exit the Participant Folder. Click on the Close Participant Folder icon, which looks very similar to the Open Participant Folder icon.
18. <instate13>	<no script>
19. Note	Since M-SPIRIT is a centralized database, participant information is transferred in real-time. This means that all data, history, notes, and alerts transfer immediately and are immediately accessible.
20. <instate14>	So, we transferred Greenie into our clinic database. Now we want to add his mom who is pregnant and never been on Montana WIC before.
	However, notice that the Create New Member icon is disabled.
	Do you remember why that is?

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	Even though we transferred Greenie into our local clinic, notice that we are still working in the statewide database.
	This is indicated on the title bar at the top of the screen and also in the Where to Search section.
21. <inststate15>	In order to be able to add Greenie's mom to his household, we need to look Greenie up in the Local database.
	This will enable the Create New Member icon.
	Easy enough to do, right? What's the first step in looking someone up in the Local database?
22. <inststate16>	We already have our search criteria defined from our previous search for Greenie.
	For the sake of time, we are going to assume that we searched for statewide by Greenie's mom's birthday already and verified that she's never been on Montana WIC in the past.
	Simply press the Enter key or click the Search button.
23. <inststate17>	Although there are more records that match this criteria, Greenie is still highlighted in the Participant List.
	...and since we are now working in the Local database, the Create New Member icon is enabled and we can add mom to Greenie's household.
	There is one more activity we need to review in the Participant Search/List screen: View Participant Transfer History.
24. XferHx	<no script>
25. XferHx1	The View Participant Transfer History window displays a list of all participants transferred into and out of your agency that match criteria you specify.
	Since M-SPIRIT is a centralized database, all of the information on this screen is updated real-time, or immediately, as participants transfer in and out of your agency and other agencies.
26. <xferhx>	Click on the Activities menu.
27. <xferhx1>	Select View Participant Transfer History.
28. <xferhx2>	At least one filter criteria is required.
	If you enter the State WIC ID, only the transfer history for that participant will display in the Transfer History grid.

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	Enter 583293 into the State WIC ID field and click the Apply Filter button....
29. <xferhx3>	...and only Greenie Grasshopper's transfer history is displayed.
	The Transfer History grid displays the following information: the Transfer Date and Time, State WIC ID, and Participant Name, the agency and clinic the participant transferred From, the agency and clinic the participant transferred To, and the Staff ID of the user that performed the transfer.
30. <xferhx4>	Along with State WIC ID, you can also search by entering the participant's name or by entering a date range.
	If you want to print the report, simply click the print button.
31. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Questions forum on the Montana WIC website.
	All questions will be answered at a review session and in the Montana WIC web site Q & A section.